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Title: Document Configuration Management Training

Author(s): McCall, Stacey Jo

Intended for: Training

Issued: 2020-11-25

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Document Configuration Management

Training

Stacey McCall

DCM Team Lead

Weapon Systems Engineering

OVERVIEW

The Weapon Systems Engineering Division (W) provides the system engineering and program management necessary to sustain the safety, reliability, and security of the Los Alamos National Laboratory's assets in the active United States nuclear stockpile - the B61, W76, W78 and W88. The Division generates key certification data for Annual Assessment supporting the Laboratory Director's letter to the President on the health of those warheads. This role demands ongoing surveillance of the active stockpile and evaluation of the potential impact of any issues through design, engineering, fabrication, testing using state-of-the-art computational simulation tools and engineering test facilities. The Division works in close liaison with the several production facilities across the nuclear security complex as well as with the customers in the US Navy and Air Force. The Division continually invests to advance the capabilities underpinning its mission in engineering, explosives safety and security.

CONTACTS

Division Leader
Donald L. Quintana

Deputy Division Leader
Craig Van Pelt (Acting)

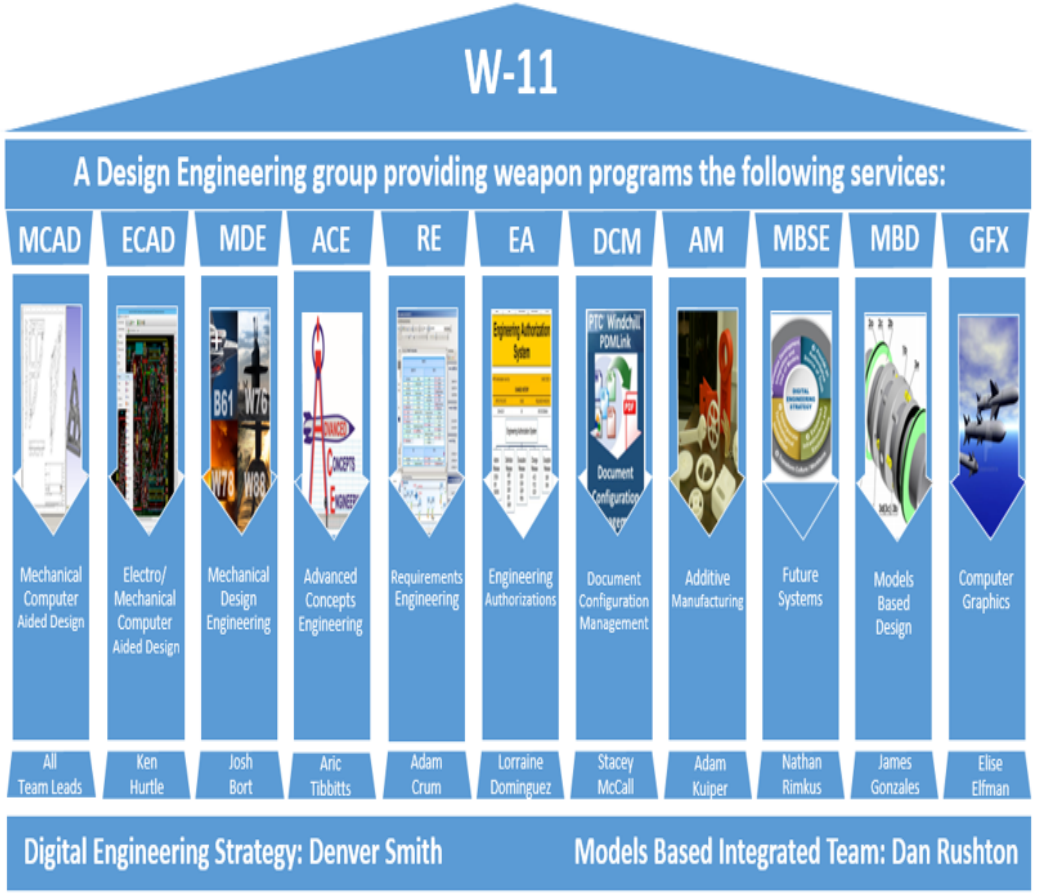
W-11 is a diverse service group providing Weapon Programs support

CAPABILITIES & SERVICES

W-11 is a design engineering group with eleven focus areas supporting weapon programs and related activities. W-11 works closely with ALDW-DAQ supporting multiple levels of design engineering rigor determined by DOE, NNSA, LANL policy, customer requirements, industry & standards

Potential Support

- ❑ MCAD/ECAD
- ❑ DES/MBSE/MBD
- ❑ Advanced Concepts Engineering (ACE)
- ❑ Requirements Engineering (RE)
- ❑ Engineering Authorization (EA)
- ❑ Document Configuration Mgmt (DCM)
- ❑ Additive Manufacturing (AM)
- ❑ Graphic Design (GFX)



DCM–Working Safely and Securely

- Purpose:

  Why have document configuration?
  - process multiple document types in a consistent manner for ALDW, W, Q, E and WRS
  - emphasize worker safety and information security
- Who: (responsibilities)
  - You the Customer
  - DCM

Meet the Team

Employee	Responsibilities
Stacey McCall	❖ Oversees document processors and assigners ❖ Processes on-hold documents ❖ Troubleshoots problems (software or process) ❖ Documents final quality check ❖ Document audit ❖ Transfers ❖ UK Program distribution ❖ Back-up assigner
Lucille Cordova Lina Martinez	❖ Processes technical reports, system engineering and administrative documents, document types ❖ (classified and unclassified) ❖ Processes memos, letters, and presentations (classified and unclassified) ❖ Processes ADW QS and TRN documents ❖ (Lina Martinez) Primary mentor/trainer for new processors ❖ (Lina Martinez) provide training to customers in PDMLink general users.
Sandra Yates	❖ Primary processor for technical procedures ❖ Provides reports management for matrix ❖ Transfers ❖ Pre-quality check ❖ (PDMLink "reviewer") documents (verifies attributes are updated, references are either attached or related, native file is attached, etc.) ❖ Uploads surveillance records ❖ Back-up assigner
Kristi Russell	❖ Processes specifications (classified) ❖ Works closely with engineering authorization (EA) and Program Liaisons Team
Brianna Vigil	❖ Assigns document and specification numbers ❖ Assigns numbers for final procedures (uploads, relates to PDMLink) ❖ Transfers ❖ Pull Look Ahead Reports

Technical Writer-Editors

- Provide writing and editing
  - Basic editing, including spelling, grammar, and punctuation
  - Correct word usage
  - More advanced levels of edit, such as sentence and paragraph structure as well as the overall information flow and cohesiveness of the document
  - Proper citation and us of figures, tables and references to follow technical communication conventions
- Ensure that documentation for W, Q, E, ALDW, and WRS follows both LANL-specific publication standards and technical communication standards

This Briefing–Overview

- The DCM process
- Requesting a document number: dcmrequest@lanl.gov both high and low side
- PDMLink–access and basic search
- Making changes–minor and major
- Checking the status of your document

PDMLink Is Your Friend…

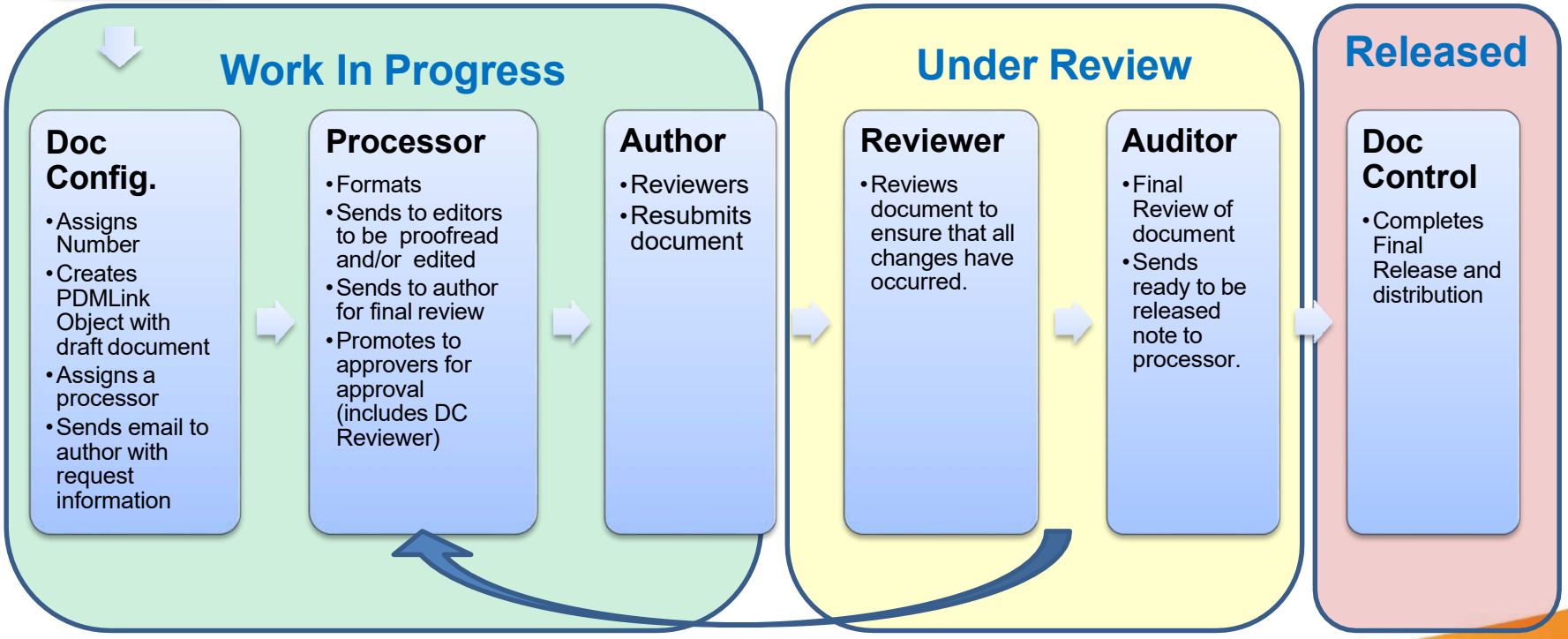
Using PDMLink allows us to focus on providing organizational accountability and effective life cycle management of electronic documents and records. PDMLink allows us to

- share information with others,
- keep your information safe and secure,
- increase productivity and efficiency,
- improve customer service, and
- eliminate fear of lost or stolen documents.

Strengthening the ability to organize and manage your documents and records during their life cycle “from creation to completion.”

Document Configuration

Author
- Creates Draft Document
- Submits to dcmrequest@lanl.gov



Request

- Document type, Group, Classification
- Authors Name, Approvers/Reviewers RLM, DC Reviewer
- Title (U)
- LA-controlled publication (CP) or LA-unlimited release (UR) required
  - (Unclassified) Abstract
  - Program and Cost Code
  - Location
  - Date
- Standard turnaround (2 weeks)

Best Practice…

Document Configuration Request Form SAVE PRINT CLEAR FORM

W-FORM-0035
Revision A
Page 1 of 1

DOCUMENT CONFIGURATION REQUEST FORM

Author's* (Originator) Name:_____ Date Submitted: _____

Due Date:_____ Program Code: _____

Document Category: ☐ TP ☐ AD ☐ SE ☐ TR
☐ Memo/Letter ☐ Presentation ☐ Test Doc.
☐ Other: _____

Classification: ☐ Classified ☐ Unclassified
Derivative Classifier: _____
Derived From:_____

Does document require LACP/LAUR? ☐ Yes ☐ No

If yes, please include unclassified abstract, location, and purpose with this form.

☐ Document Number Only – A draft/no content placeholder will be uploaded into PDMLink. A processor will not be assigned until a final request has been resubmitted.

Please note the turnaround time for documents to be released through processing is generally 2 weeks. If you need a quick turnaround time please complete justification below:

Justification:

Approvals for expediting (Deputy GL/GL):

Additional Information:

Signature: [redacted]

If document is Official Use Only, please complete the lower portion of this form.

REQUIRED FOR OFFICIAL USE ONLY INFORMATION

Exemptions:

- ☐ 3 – Statutory Exemption (examples: CRADA Information, Export Controlled Information)
- ☐ 4 – Commercial/Proprietary (examples: Trade Secrets, Financial Data, Business Plans, Cost Data)
- ☐ 5 – Privileged Information (examples: Recommendations, Evaluations, Appraisal Results, Drafts of New Policies, Attorney/Client Exchanges)
- ☐ 6 – Personal privacy (examples: Medical Condition, Marital Status, Social Security Number, Unlisted Home Phone Number)
- ☐ 7 – Law Enforcement (examples: On-going Investigative Reports, Reports which would impair impartial adjudication, Confidential Sources)
- ☐ 8 – Financial Institutions (example: Reports on the financial condition of a Bank)
- ☐ 9 – Wells (examples: Resource Maps, New Drilling Techniques, Well Head Analysis)

What information in the document is considered OUO?:

How would the release of the information have potential damage to governmental, commercial, or private interests, including possible consequences of release?

Why does the information fit into the chosen Freedom of Information Act (FOIA) category?

W-FORM-0035 (09/19) * *The author/originator fills out and submits this form to dcmrequest@lanl.gov*

What happens next…

- Process document
  - upload
  - configuration management
  - assign
  - notification/email
    - drafts
    - processing

Sending Transfer Requests for Large Documents

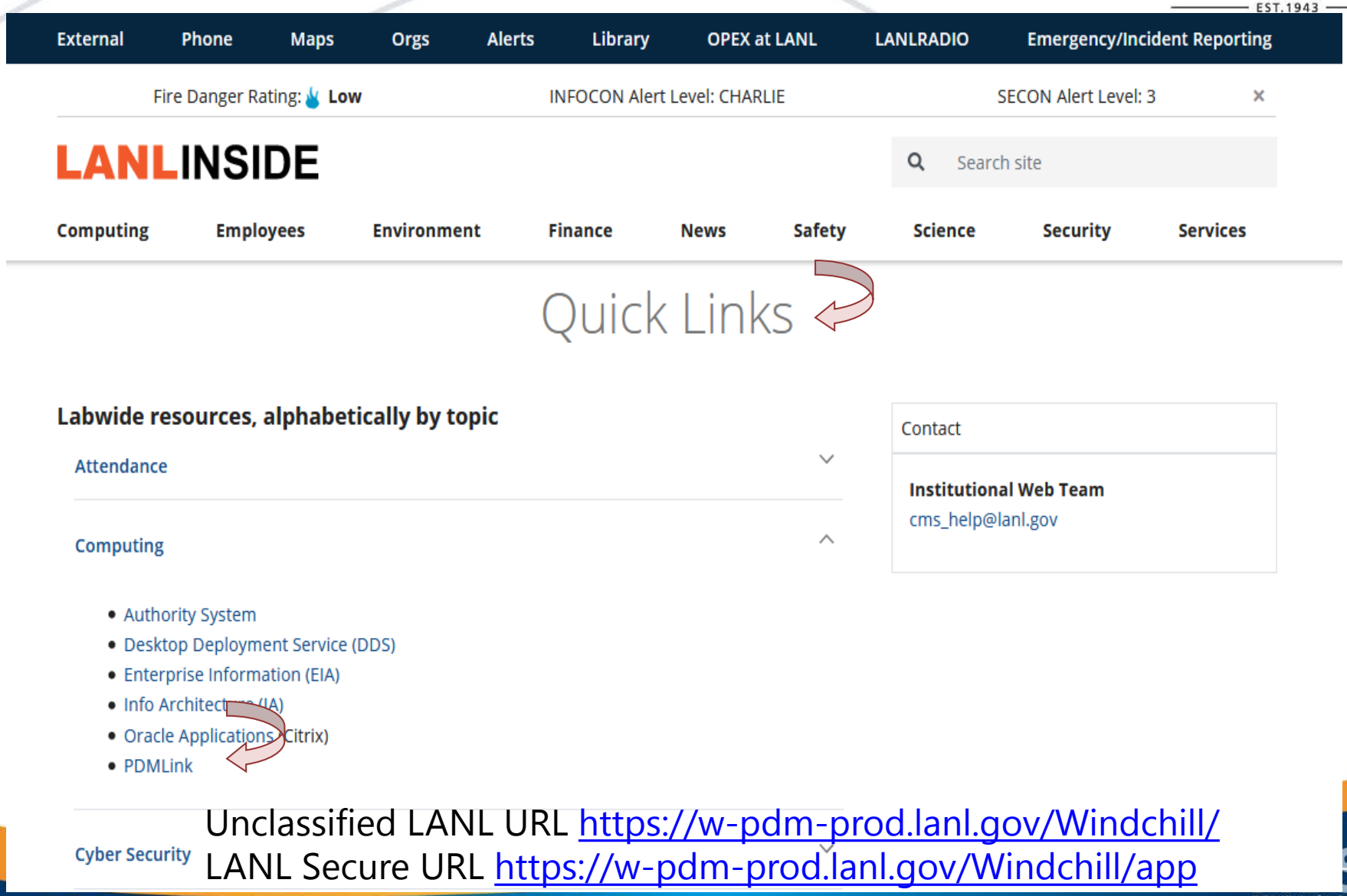
Large documents (over 10 mb) need to be sent through transfer.lanl.gov to assigners directly:

- Brianna Vigil, brivigil@lanl.gov (primary)
- Sandra Yates, sand@lanl.gov (back-up)
- Stacey McCall, smccall@lanl.gov (secondary back-up)

Approval and Review

- The DCM Team will promote a document to author(s) for review and/or approval using the PDMLink.
  - (Note: It is suggested that you check your PDMLink Home tab often for changes and updates.)
- Approvers can use either of two methods to document comments and/or changes.
  - Extensive changes/comments–Check out and Edit, activate "Track Changes" on, and then upload the document back into PDMLink.
  - Promotion request–review and complete your task.

How to Find PDMLink



Unclassified LANL URL https://w-pdm-prod.lanl.gov/Windchill/
LANL Secure URL https://w-pdm-prod.lanl.gov/Windchill/app

PDMLink Home Page

Los Alamos NATIONAL LABORATORY

LANLINSIDE

Computing Employees Environment Finance News Safety Science Security Services

Administrators Resources

Forms

Product Data Management, PDMLink

NOTE: Please update your bookmark/shortcut to access the NEW Unclassified PDMLink below.

- Unclassified PDMLink (WLink) Secure Login

PDMLink Support

Contact the WLink Software Tools Team

1,600 accounts and growing

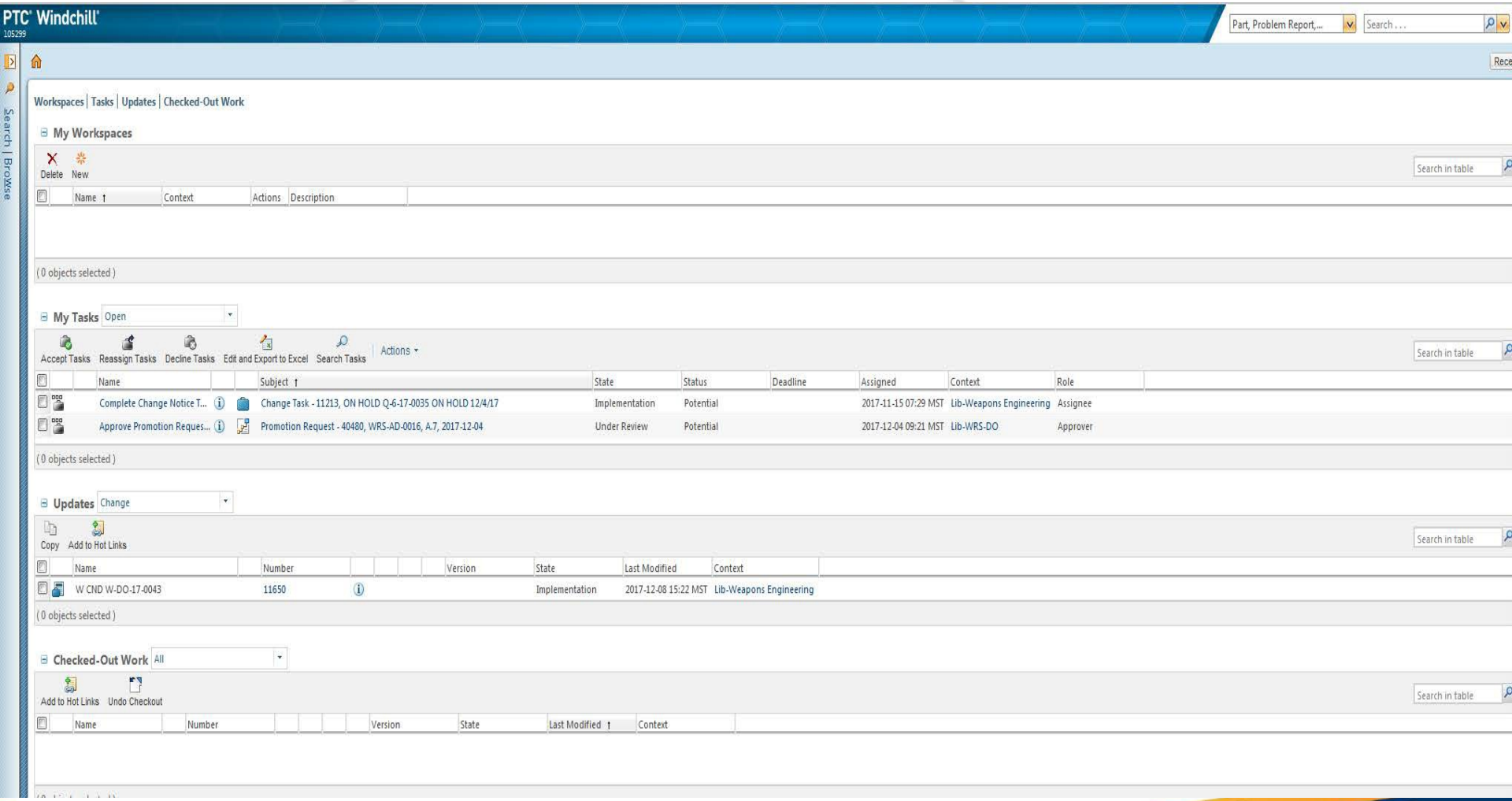
PDMLink is a product definition, configuration management, and collaboration tool. It is the first data management system that retains computer aided design data parametric relationships while providing configuration management and control to other document types.

Contacts

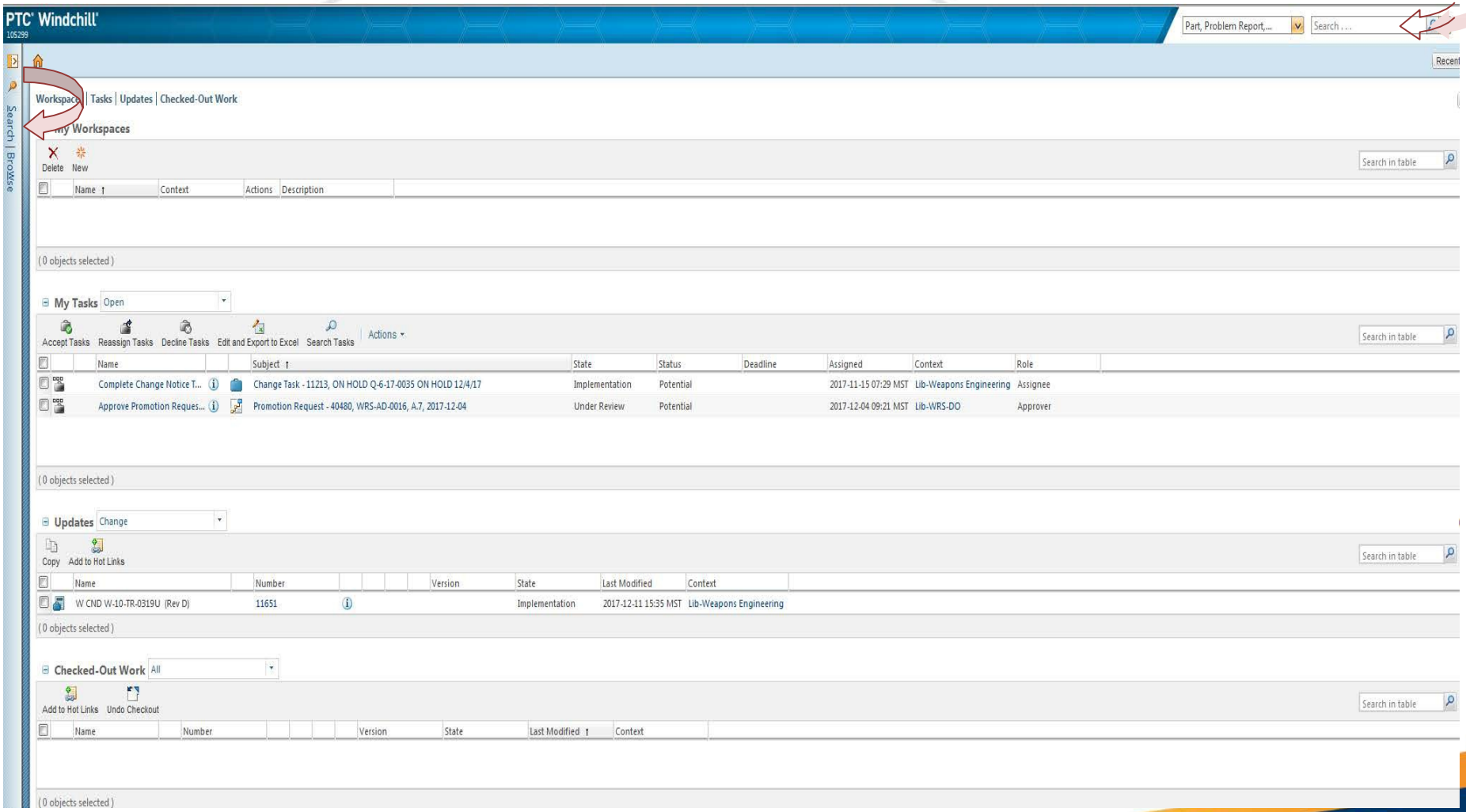
Infrastructure Transformation Project Lead
Melissa Aragon

WRS-WMT Homepage

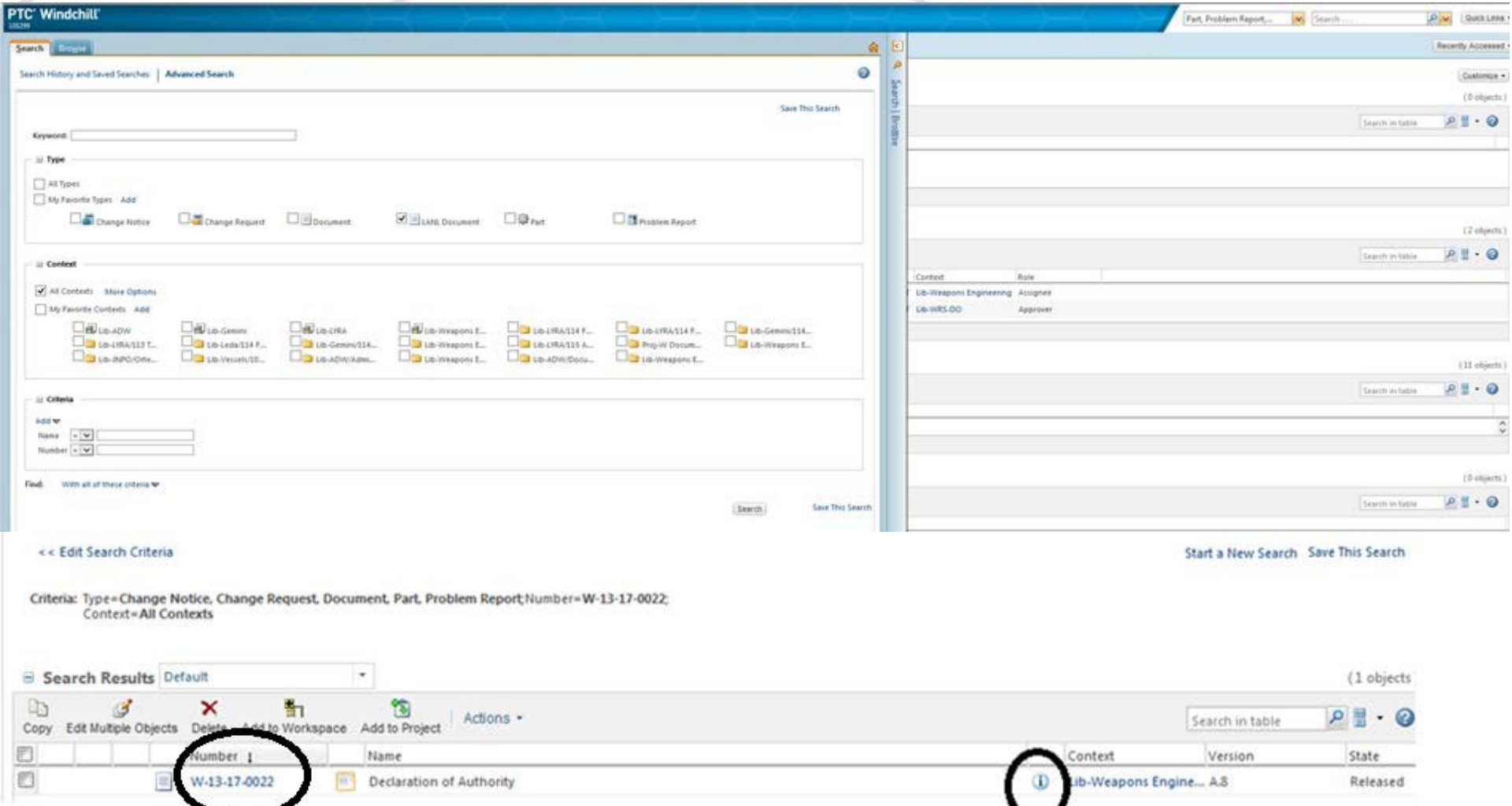
Home Tab


PTC Windchill
105299
Part, Problem Report,...
Search . . .
Workspaces | Tasks | Updates | Checked-Out Work
My Workspaces
Delete
New
Search in table
Name
Context
Actions
Description
(0 objects selected)
My Tasks
Open
Accept Tasks
Reassign Tasks
Decline Tasks
Edit and Export to Excel
Search Tasks
Actions
Search in table
Name
Subject
State
Status
Deadline
Assigned
Context
Role
Complete Change Notice T...
Change Task - 11213, ON HOLD Q-6-17-0035 ON HOLD 12/4/17
Implementation
Potential
2017-11-15 07:29 MST
Lib-Weapons Engineering
Assignee
Approve Promotion Reques...
Promotion Request - 40480, WRS-AD-0016, A.7, 2017-12-04
Under Review
Potential
2017-12-04 09:21 MST
Lib-WRS-DO
Approver
(0 objects selected)
Updates
Change
Copy
Add to Hot Links
Search in table
Name
Number
Version
State
Last Modified
Context
W CND W-DO-17-0043
11650
Implementation
2017-12-08 15:22 MST
Lib-Weapons Engineering
(0 objects selected)
Checked-Out Work
All
Add to Hot Links
Undo Checkout
Search in table
Name
Number
Version
State
Last Modified
Context

Search Engine

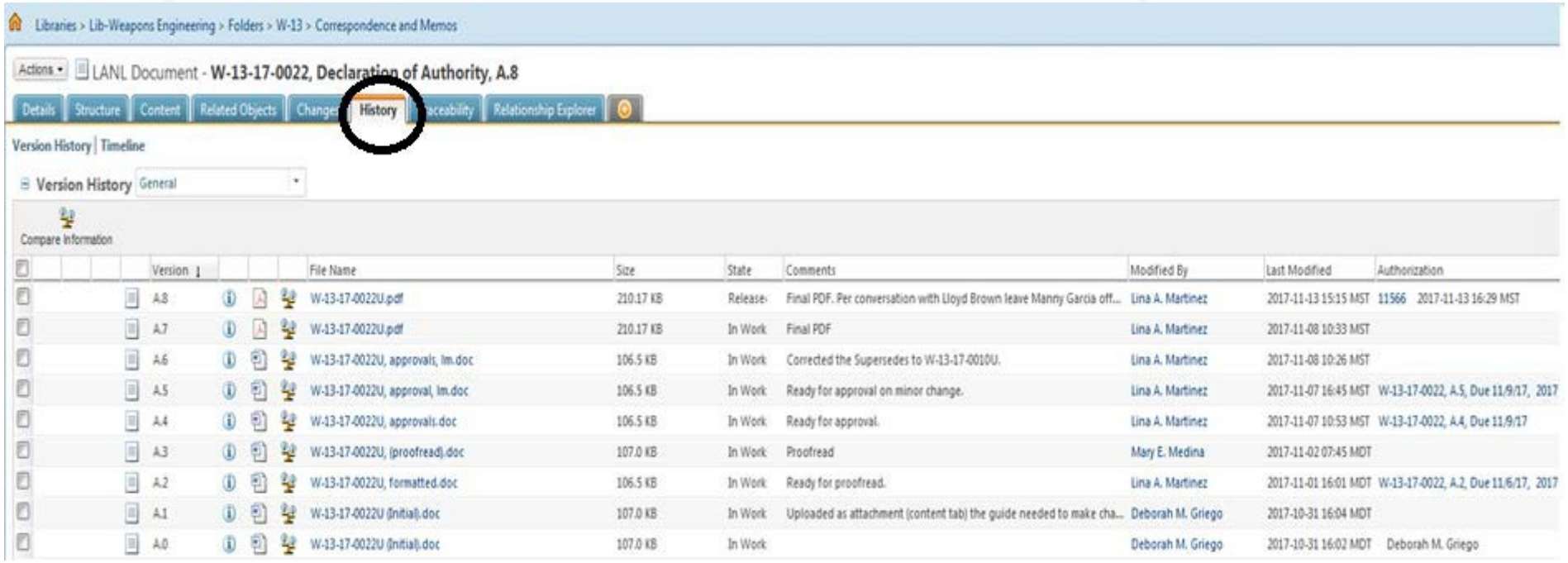


Search


PTC Windchill
Search
Browse
Search History and Saved Searches | Advanced Search
Save This Search
Keyword:
Type
All Types
My Favorite Types Add
Change Notice
Change Request
Document
LANL Document
Part
Problem Report
Context
All Contexts More Options
My Favorite Contexts Add
Criteria
Add
Name
Number
Find: With all of these criteria
Search
Save This Search
Search Browse
Part, Problem Report...
Search ...
Quick Links
Recently Accessed
Customize
Search in table
Context
Role
Lib-Weapons Engineering Assignee
Lib-WRS-DO Approver
<< Edit Search Criteria
Start a New Search
Save This Search
Criteria: Type=Change Notice, Change Request, Document, Part, Problem Report;Number=W-13-17-0022;
Context=All Contexts
Search Results Default
(1 objects
Copy
Edit Multiple Objects
Delete
Add to Workspace
Add to Project
Actions
Search in table
Number
Name
Context
Version
State
W-13-17-0022
Declaration of Authority
Lib-Weapons Engine...
A.8
Released

Document Home

- History Tab

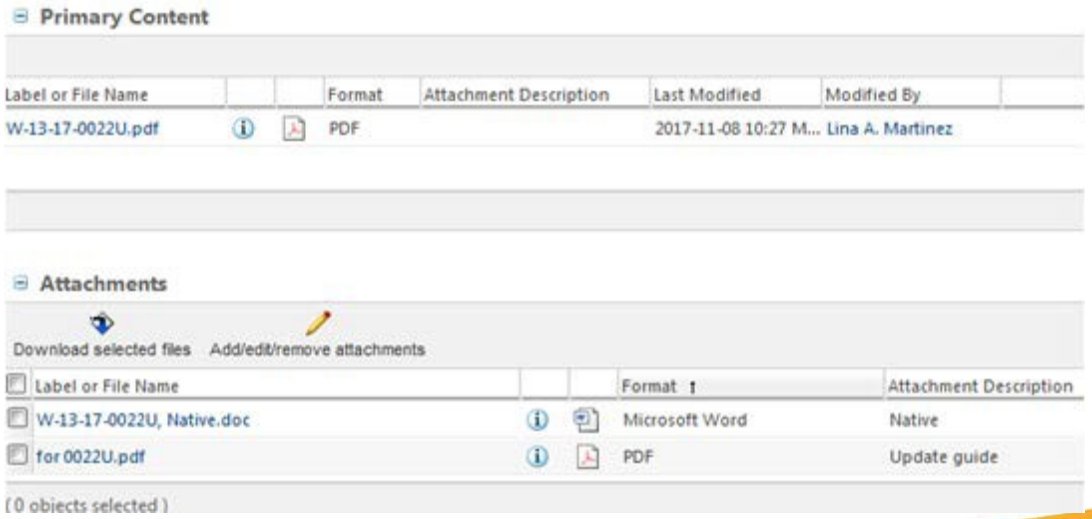


Version	File Name	Size	State	Comments	Modified By	Last Modified	Authorization
A.8	W-13-17-0022U.pdf	210.17 KB	Release	Final PDF. Per conversation with Lloyd Brown leave Manny Garcia off...	Lina A. Martinez	2017-11-13 15:15 MST	11566 2017-11-13 16:29 MST
A.7	W-13-17-0022U.pdf	210.17 KB	In Work	Final PDF	Lina A. Martinez	2017-11-08 10:33 MST	
A.6	W-13-17-0022U, approvals, lm.doc	106.5 KB	In Work	Corrected the Supersedes to W-13-17-0010U.	Lina A. Martinez	2017-11-08 10:26 MST	
A.5	W-13-17-0022U, approval, lm.doc	106.5 KB	In Work	Ready for approval on minor change.	Lina A. Martinez	2017-11-07 16:45 MST	W-13-17-0022, A.5, Due 11/9/17, 2017
A.4	W-13-17-0022U, approvals.doc	106.5 KB	In Work	Ready for approval.	Lina A. Martinez	2017-11-07 10:53 MST	W-13-17-0022, A.4, Due 11/9/17
A.3	W-13-17-0022U, (proofread).doc	107.0 KB	In Work	Proofread	Mary E. Medina	2017-11-02 07:45 MDT	
A.2	W-13-17-0022U, formatted.doc	106.5 KB	In Work	Ready for proofread.	Lina A. Martinez	2017-11-01 16:01 MDT	W-13-17-0022, A.2, Due 11/6/17, 2017
A.1	W-13-17-0022U (Initial).doc	107.0 KB	In Work	Uploaded as attachment (content tab) the guide needed to make cha...	Deborah M. Griego	2017-10-31 16:04 MDT	
A.0	W-13-17-0022U (Initial).doc	107.0 KB	In Work		Deborah M. Griego	2017-10-31 16:02 MDT	Deborah M. Griego

Tabs

- Details

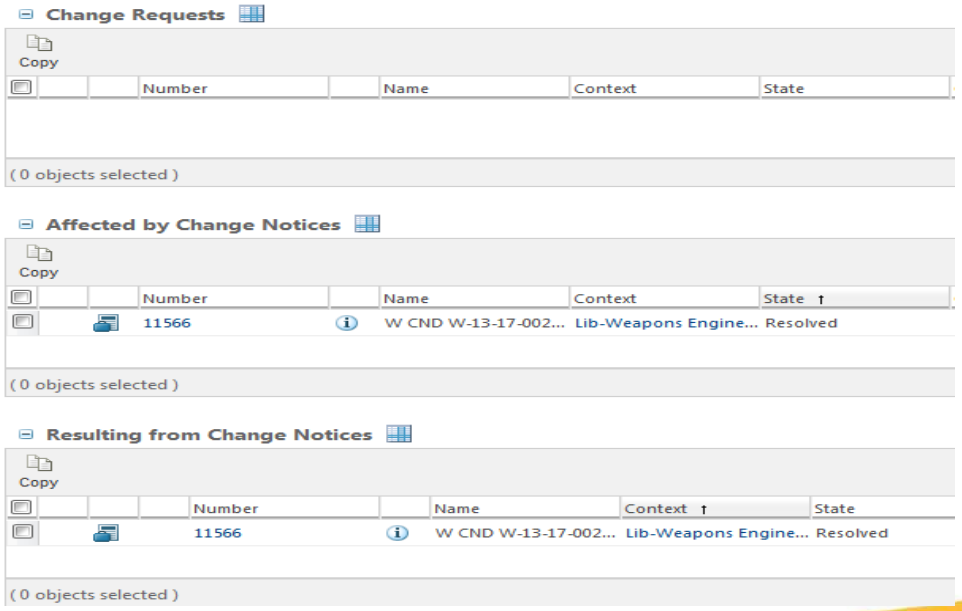
- Content



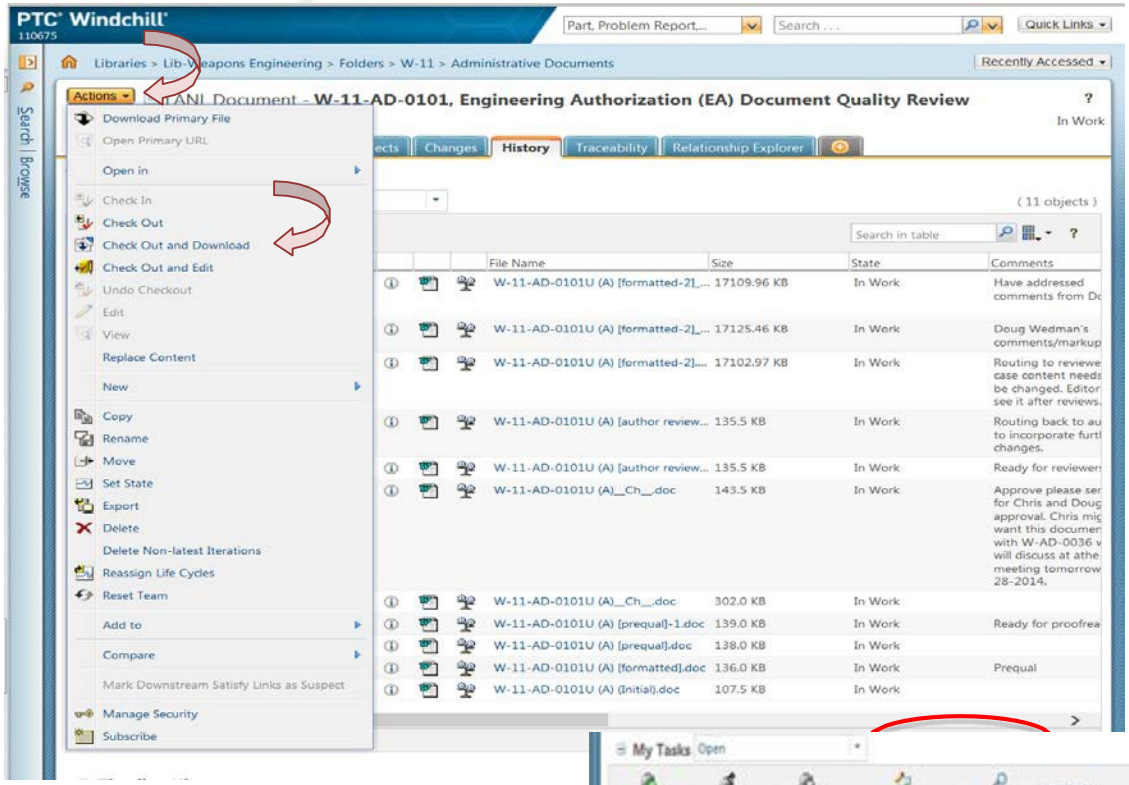
Tabs

- Related Objects

- Changes

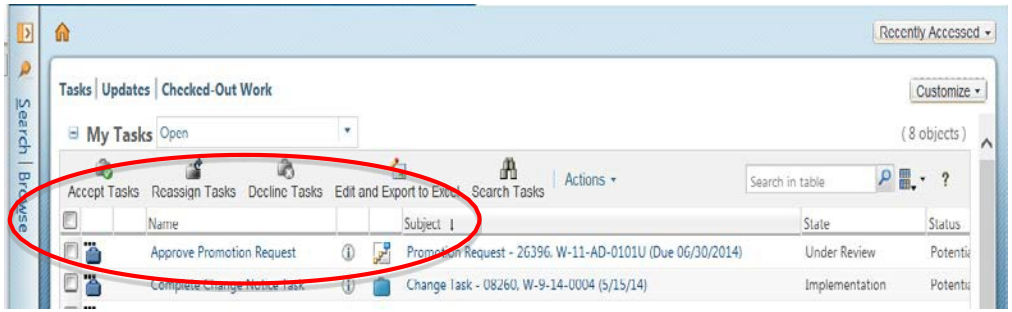


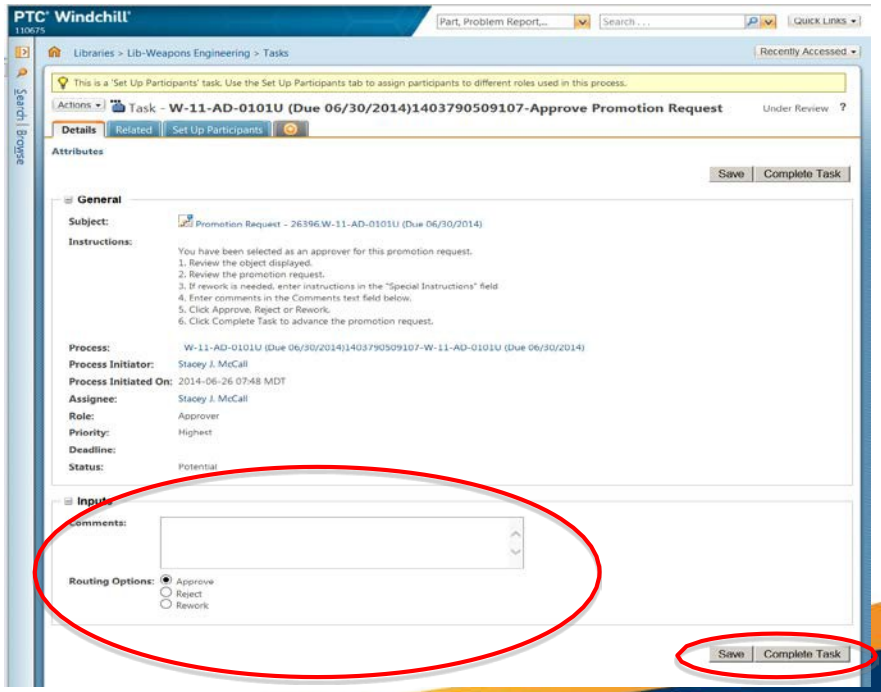
Major Changes and Comments



Few Changes

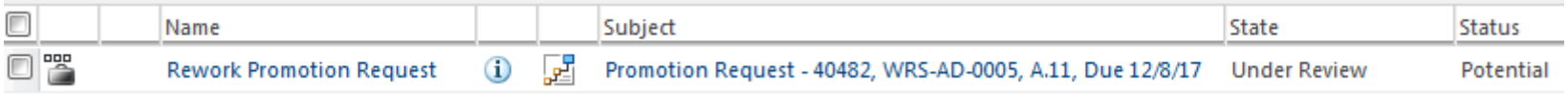
- If a few changes are needed, the reviewer/approver can simply use the "Comments" field in the PDMLink closeout screen to document them. Please note that it is very important that you read and understand your role as an Approver. For additional guidance read W-DG-0001U, *Reviewing and Approving Documents in PDMLink*.





Rework

- If rework is selected this document will need to have changes made by the author or the approver. The processor will see the document as rework on their home tab.



	Name		Subject	State	Status
	Rework Promotion Request		Promotion Request - 40482, WRS-AD-0005, A.11, Due 12/8/17	Under Review	Potential

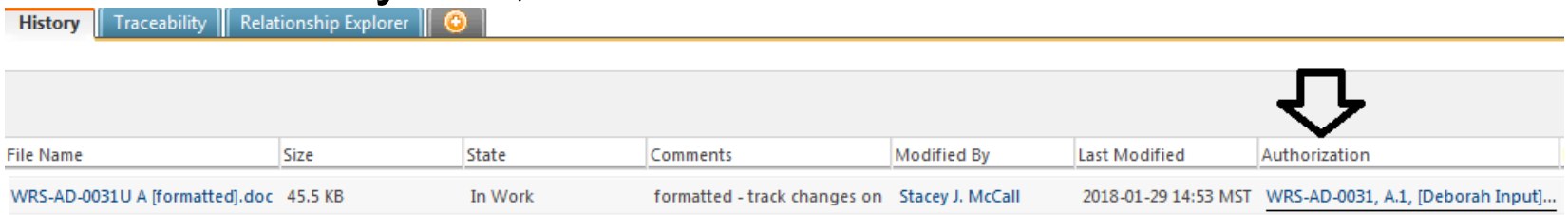
- If the changes are minor, then the document will go to the approver who submitted it for a rework to approve again.
- If the changes are major, then the document will go through all of the approvals again.

Promotion Comments from Email

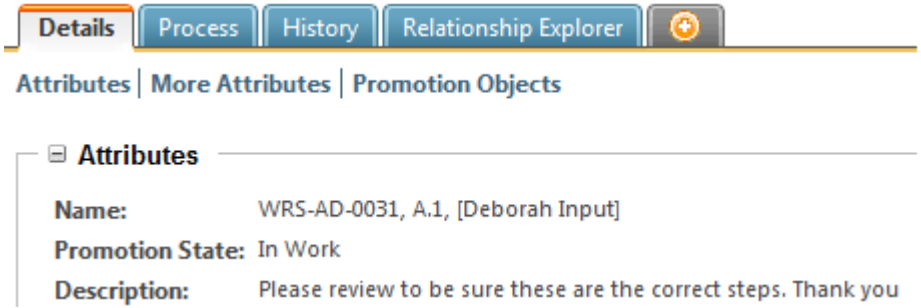
- Click on Promotion Target from your email
- You have been assigned a Approve Promotion Request – DCM Checklist for Processing SR Documents .

  Instructions: Promotion Target DCM Checklist for Processing SR Documents

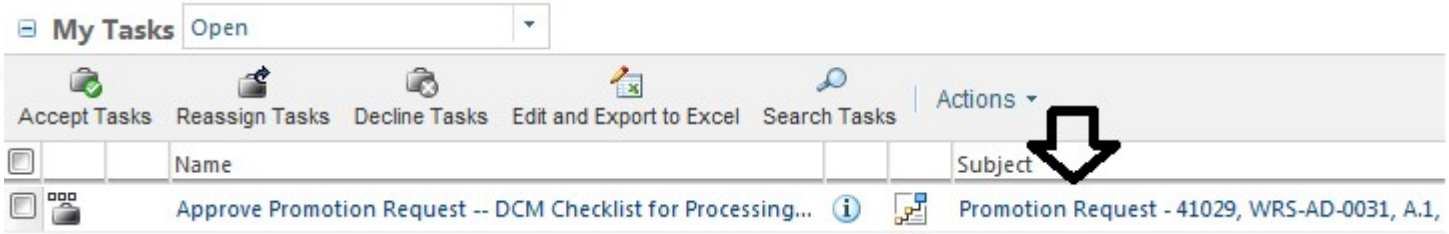
  You have been selected as an approver for this promotion request.
  1. Review the [Document, Drawing, Part, Assembly] displayed in the Target line.
  2. Review the promotion request.
- Go to History Tab, Under Authorization Click Doc.Number



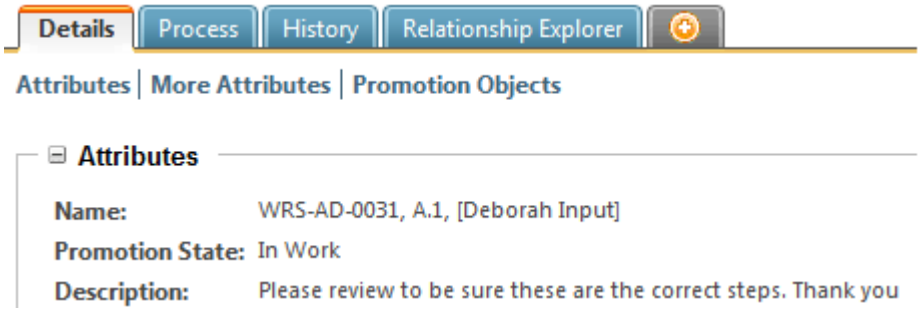
- Description:



Promotion Comments

- On your **Home Tab**, click on the words “Promotion Request”
- 

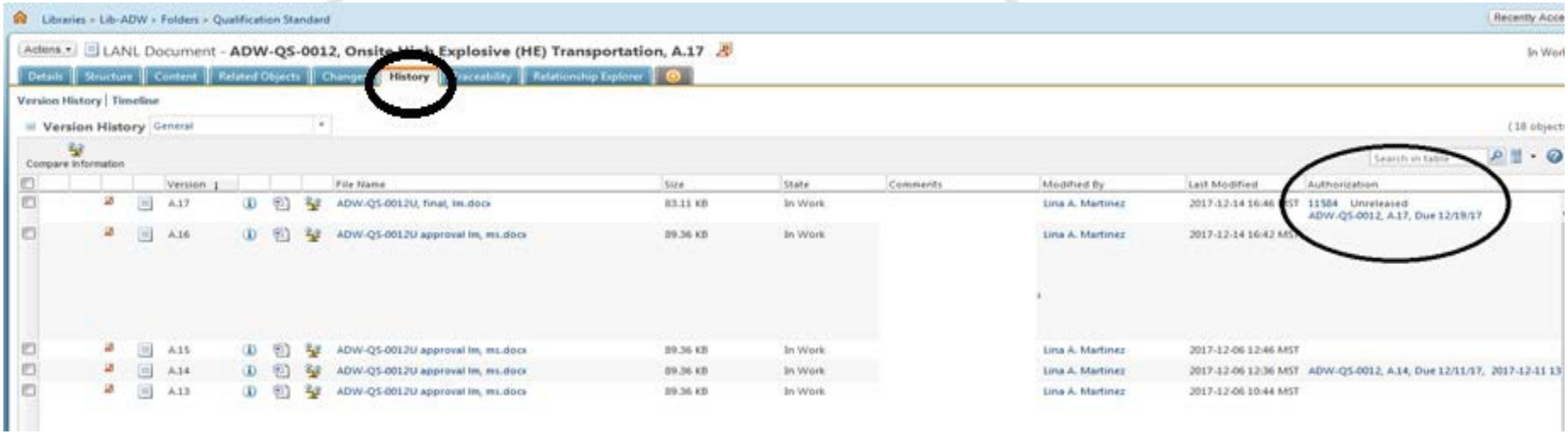
- Under Details Tab, Click on the words “Promotion Request”
- Description:



Promotion Process

- When the Assignee approves or selects rework, this will be beneath the “Vote” tab.
- The Assignee may also add a comment in the comments tab letting the processor know if changes need to be made.
- If the approved button is selected, the processor will then move forward with the next approval or the document will be ready for release.

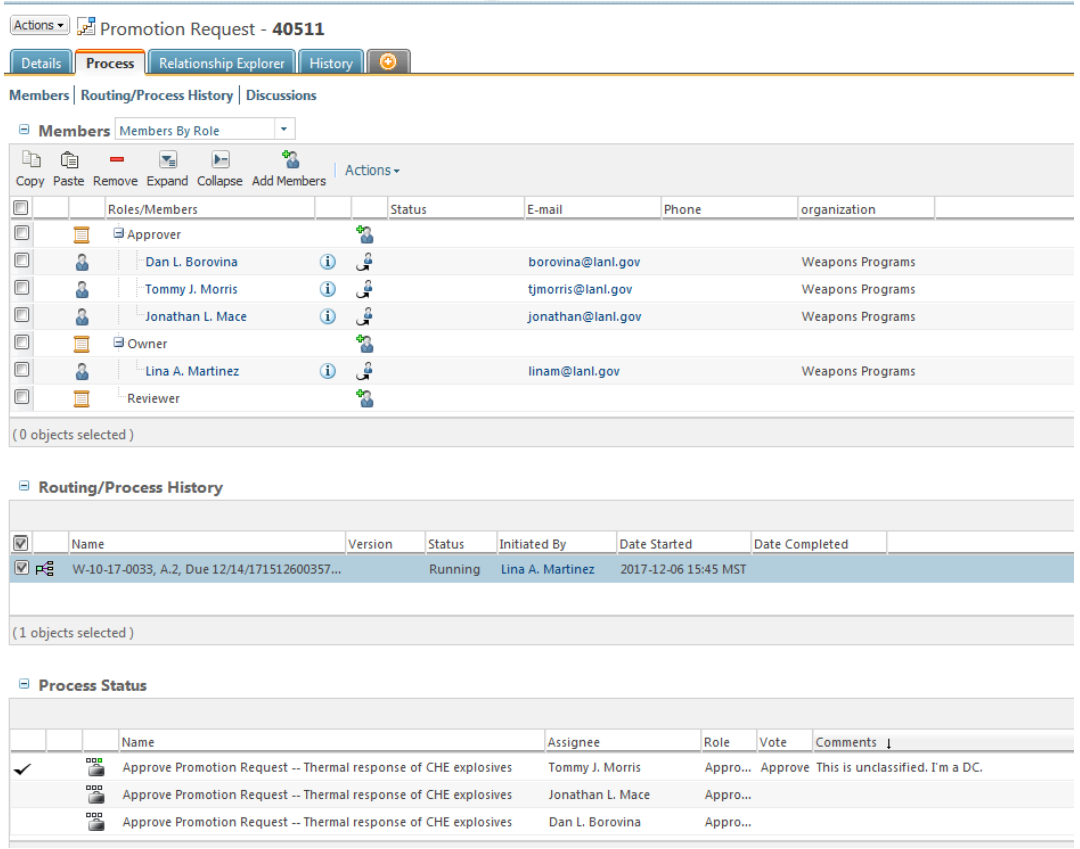
Pending Approvals Status



- Enter file name in Search block (upper right-hand corner)
  - Click
    - Click on “History” tab
    - Click on File name under “Authorization” tab

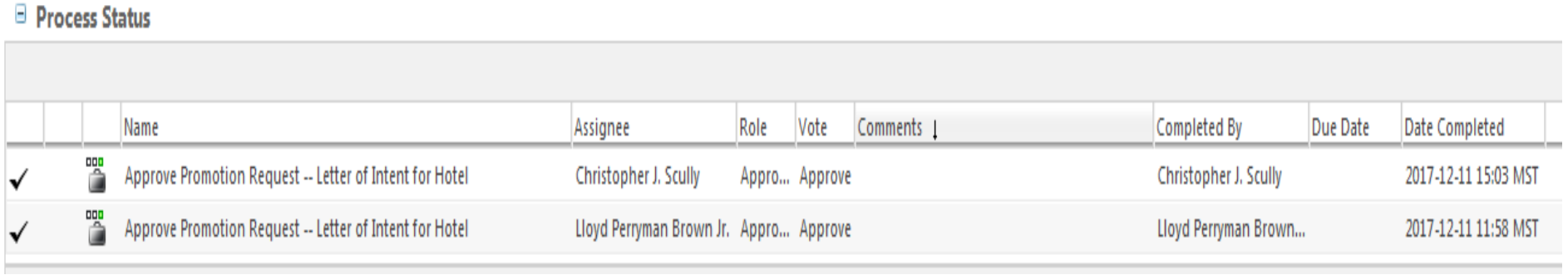
Viewing Approval Status

- Click on “Process” tab
- Under Process Status
- Assignee is listed
- Role displayed will be “Approved” or “Rework”
- Checkmark indicates if task has been completed



Viewing Approval Status

- When the review and approval are completed by all approvers, the tab at the left hand side check marked and the vote listed as approve.



Process Status

			Name	Assignee	Role	Vote	Comments	Completed By	Due Date	Date Completed
✓			Approve Promotion Request -- Letter of Intent for Hotel	Christopher J. Scully	Appro...	Approve		Christopher J. Scully		2017-12-11 15:03 MST
✓			Approve Promotion Request -- Letter of Intent for Hotel	Lloyd Perryman Brown Jr.	Appro...	Approve		Lloyd Perryman Brown...		2017-12-11 11:58 MST

- If this document is still pending approvals, there will not be a check mark or under vote it will not state approve.

What can the DCM Team not Process and/or Handle?

- HR Sensitive Documents
- Hard copy classified distribution
- *We do; however, do electronic distribution emails both on the high and low side.

Resources

7.0 REFERENCES

P805	*Export Control*
P1020	*Document Control and Records Management*
P1020-1	*Laboratory Records Management*
P 1020-2	*Laboratory Document Control*
PD1022	*Review and Release of Scientific and Technical Information*
DPBPS T030	*Product Definition Types*
FORM 648	*Technical Information Release Form*
W-DO-18-0021	*Clarification of NAP23, R024, and T146 Tier 2 and Tier 3 Items and T146 Tier 2 and Tier 3 Items and Information*
W-AD-0096U	*Technical Procedure Process*
W-DG-0001U	*Reviewing and Approving Documents Using PDMLink*

W-AD-0055U	*W Division Records Management Plan*
W-FORM-0035U	*Document Configuration Request Form*
W-SE-0008U	*Use and Approval of Engineering Authorizations*
W-SE-0012U	*Weapon Systems Engineering Division Configuration Management Plan*

Questions?